

Help Desk Authority®

HDAccess User Manual

Help Desk Authority 9.0

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Overview

HDAccess is a self-help solution that gives you an easy, online interface to your help desk Issues and your help desk organization's knowledge base.

Through a standard internet connection and browser you can:

- Enter new issues
- Monitor the status of your issues
- Perform queries on your issues
- Access the wealth of knowledge available in your provider's knowledge base

To get started, enter the URL of your provider's HDAccess site in your favorite browser.

Browser Requirements

HDAccess:

- Microsoft Internet Explorer 7/8/9
- Mozilla Firefox 3.6/4
- Google Chrome 11
- Apple Safari 5

Logging into HDAccess

When you initially open HDAccess in your web browser, the Requester Login window is displayed:



Requester Logon Name

Password

- [Register](#)
- [Forgot Logon Name and/or Password](#)
- [Click here if you are a Help Desk Authority Administrator](#)


1. Enter your user name in the **Requester Logon Name** field.
2. Enter your password in the **Password** field.
3. Click the **Submit** button.



In some cases, the links for **Register** and **Forgot Logon Name and/or Password** will not be visible. The presence of these links is dependent upon the specified settings of the administrator.

Registering for HDAccess

If you are not yet registered to use HDAccess, click the Register link. This will open the Registration window as shown below.

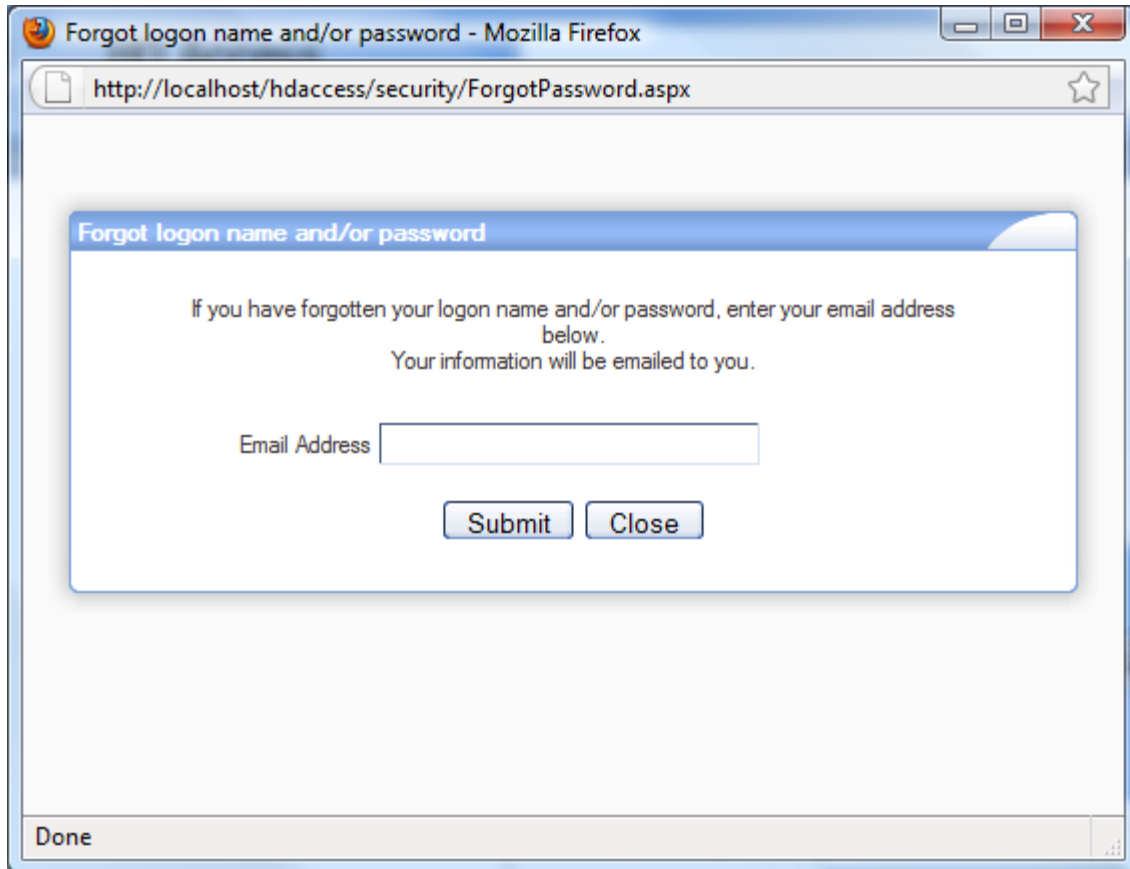


The screenshot shows a web browser window titled "Registration". Inside the window, at the top, is a message: "Fields marked with an asterisk (*) are required." Below this message are seven input fields arranged vertically. The first field is labeled "Full Name" and has a red asterisk to its right. The second field is labeled "Company Name". The third field is labeled "Phone". The fourth field is labeled "Email" and has a red asterisk to its right. The fifth field is labeled "Logon Name" and contains the text "acox"; it has a red asterisk to its right. The sixth field is labeled "Password" and contains ten black dots; it has a red asterisk to its right. The seventh field is labeled "Confirm Password" and is empty; it has a red asterisk to its right. Below the input fields are two buttons: "Submit" and "Reset". At the bottom center of the window is a blue underlined link labeled "Home".

1. Enter your name in the **Full Name** field. This field is required.
2. Enter the company name in the **Company Name** field.
3. Enter your phone number in the **Phone** field.
4. Enter your email address in the **Email** field. This field is required.
5. Enter a logon name in the **Logon Name** field. This field is required.
6. Enter your password in the **Password** field. This field is required.
7. Re-enter your password in the **Confirm Password** field. This field is required.
8. Click the **Submit** button.

Forgot Logon Name and/or Password


If you have forgotten your logon name or password, click the **Forgot Logon Name and/or Password** link. This will open the Forgot logon name and/or password window as shown below:



The screenshot shows a Mozilla Firefox browser window with the title "Forgot logon name and/or password - Mozilla Firefox". The address bar displays the URL "http://localhost/hdaccess/security/ForgotPassword.aspx". The main content area features a dialog box titled "Forgot logon name and/or password". Inside the dialog box, the text reads: "If you have forgotten your logon name and/or password, enter your email address below. Your information will be emailed to you." Below this text is a text input field labeled "Email Address". At the bottom of the dialog box are two buttons: "Submit" and "Close". The status bar at the bottom of the browser window shows the word "Done".

1. Enter your email address in the **Email Address** field.
2. Click the **Submit** button. Your information will be sent to the email address you specify.

The HDAccess Workspace



HD Access
 Demo Site


Message Board

[Issues](#) | [Knowledgebase](#) | [Tools](#) | [Help](#) | [Feedback](#)

[Logout/Login as a different user](#)

View Issues

 [Submit New Issue](#)

 [Search Knowledge Base](#)

View
 My Issues

Timeline
 All Issues

Status
 Open or Pending

More Search Criteria

Search Pane

Issue No

	Issue No	Summary	Description	Resolution	Status	Sub-Status	Priority	Due Date	Issue Type	Cate
<input type="checkbox"/>	4	Needs help instal	Needs help instal		Open	Assigned	Medium		Request for Infor Software	
<input type="checkbox"/>	3	New Employee n	New Employee n		Open	Assigned	High		Incident	User Ad
<input type="checkbox"/>	1	My anti-virus has	My anti-virus has		Open	In Progress	High		Incident	Software

Issue List

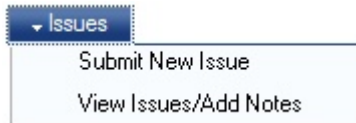
[Check All](#) [Uncheck All](#)

Page 1 of 1.

The Toolbar

The Toolbar contains four basic buttons, three of which have drop-down menus. These are explained below.

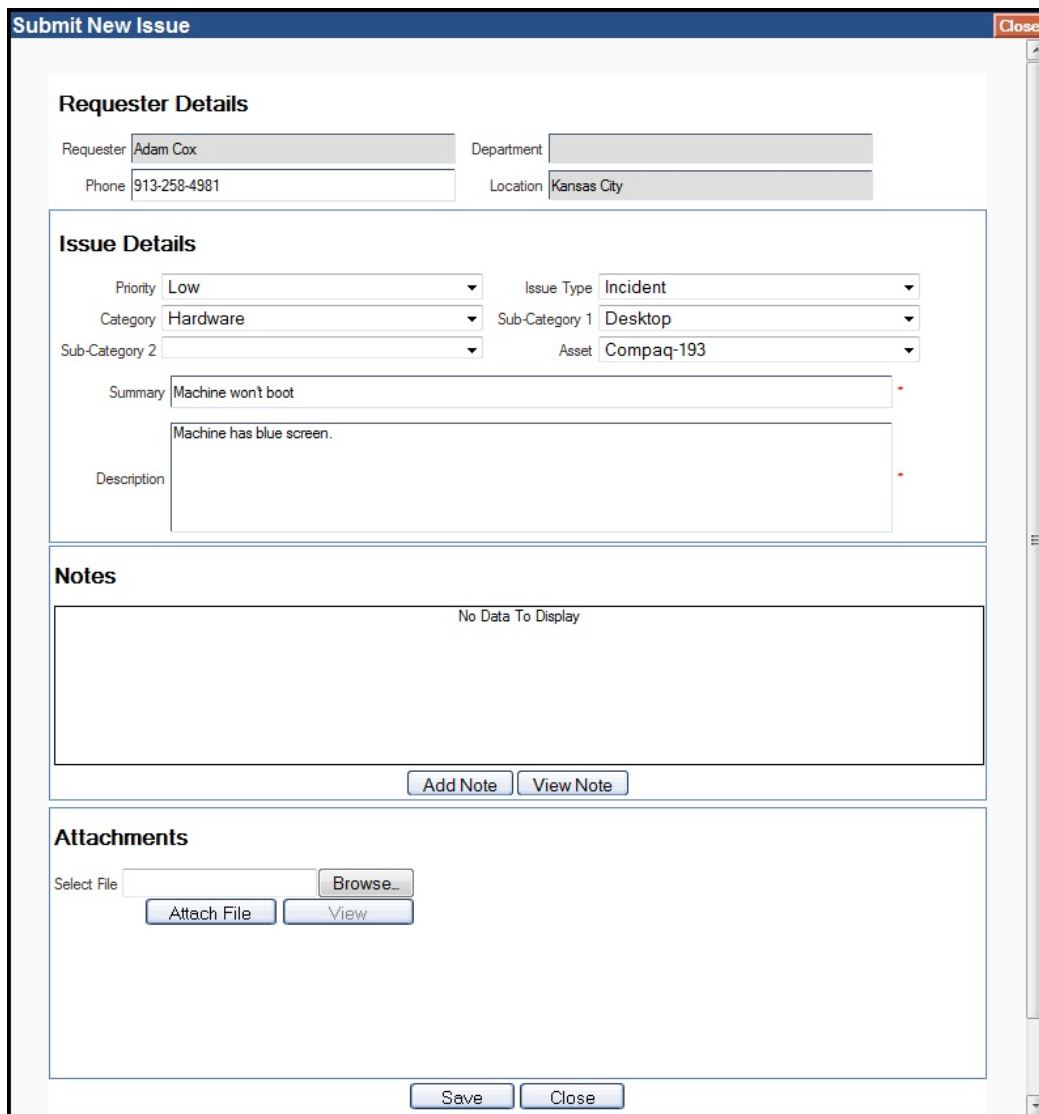
The Issues Menu



A dropdown menu titled 'Issues' with a downward arrow. Below the title, there are two options: 'Submit New Issue' and 'View Issues/Add Notes'.

Submit New Issue

Opens the Submit New Issue window.




The 'Submit New Issue' window is a web-based form with a blue header bar containing the title 'Submit New Issue' and a 'Close' button. The form is divided into several sections:

- Requester Details:** Contains fields for 'Requester' (pre-filled with 'Adam Cox'), 'Department', 'Phone' (pre-filled with '913-258-4981'), and 'Location' (pre-filled with 'Kansas City').
- Issue Details:** Contains dropdown menus for 'Priority' (set to 'Low'), 'Issue Type' (set to 'Incident'), 'Category' (set to 'Hardware'), 'Sub-Category 1' (set to 'Desktop'), 'Sub-Category 2', and 'Asset' (set to 'Compaq-193'). It also has a 'Summary' text area (pre-filled with 'Machine won't boot') and a 'Description' text area (pre-filled with 'Machine has blue screen.').
- Notes:** A large text area with the message 'No Data To Display'. Below it are 'Add Note' and 'View Note' buttons.
- Attachments:** Contains a 'Select File' text input, a 'Browse...' button, and 'Attach File' and 'View' buttons.

At the bottom of the window are 'Save' and 'Close' buttons.

1. The Requester Details section will be pre-populated with your requester data. The **Phone** field can be edited.

2. In the Issue Details section, use the drop-down menus for **Priority**, **Issue Type**, **Category**, **Sub-Category 1**, **Sub-Category 2** and **Asset**. The **Summary** and **Description** fields are required.
3. In the **Notes** field, you can add a note by clicking the **Add Note** button to open the Add Note window. To view a note, select the note and click the **View Note** button.
4. If you would like to attach a file or files to the new Issue, click the **Browse** button in the Attachments section to locate the file you wish to attach, and then click the **Attach File** button to attach the selected file.
5. When your new issue has been completed, click the **Save** button.


The Submit New Issue window can also be opened by clicking the  **Submit New Issue** button.

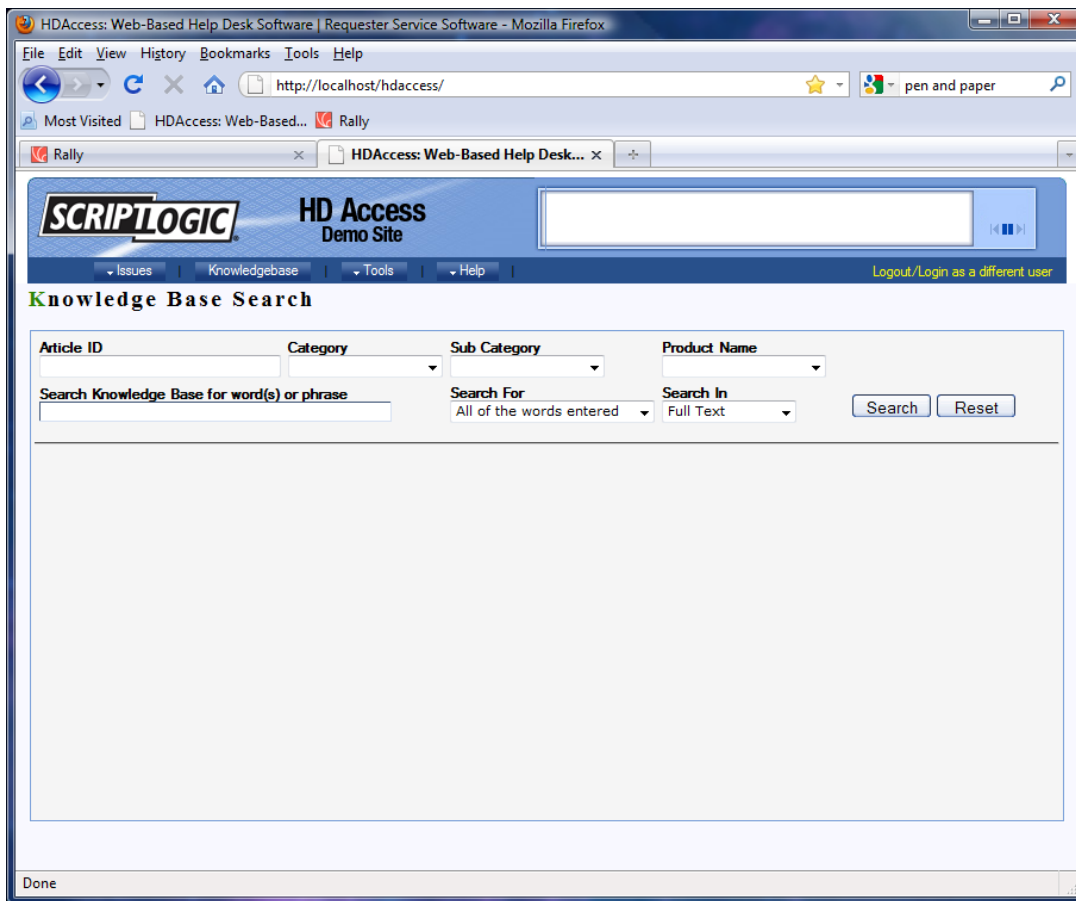
View Issues/Add Notes

This second option, View Issues/Add Notes, is simply a link back to the main issue list. If you are searching the knowledge base, for example, this link will bring you back.

The Knowledge Base

Your help desk provider maintains a collection of information including troubleshooting information, documents, articles based on previously resolved issues, and frequently asked questions for sharing within their organization. This knowledge base can be thought of as accumulated wisdom regarding their help desk experience. Each element in the knowledge base is referred to as an article and will have a unique article ID. You can access the knowledge base if the HDAccess administrator allows it and the **Knowledgebase** button in your toolbar is enabled.

The knowledge base can also be opened with the  **Search Knowledge Base** button.



Using the Knowledge Base Search window, you can find:

- All articles belonging to a particular category
- All articles belonging to a particular sub-category
- All articles pertaining to a particular product
- All articles that satisfy a combination of these criteria
- A specific article identified by the article ID

To search the knowledge base:

1. Enter the article ID, or select other search criteria from the drop-down menus, or enter keywords or phrases to search on.
2. Click the **Search** button.

The Tools Menu



Change Password

In HDAccess, a user can change his or her password at any time.

A screenshot of a 'Change Password' dialog box. The dialog has a title bar that says 'Change Password'. Inside, there is a message 'All fields are required.' at the top. Below this, there are three text input fields: 'Old Password', 'New Password', and 'Confirm Password'. The 'Old Password' field is pre-populated with ten black dots. At the bottom of the dialog, there are two buttons: 'Submit' and 'Clear'.

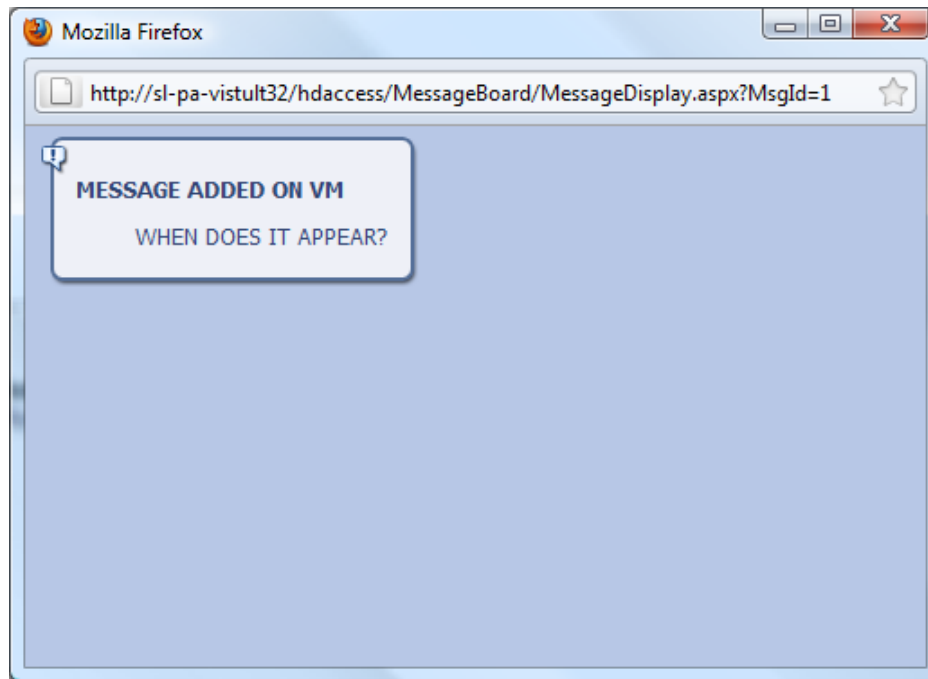
1. Under the **Tools** menu, select **Change Password**. This will open the Change Password pop-up window.
2. The **Old Password** field will be pre-populated with your current password.
3. In the **New Password** field, enter a new password.
4. In the **Confirm Password** field, re-enter your new password.
5. Click the **Submit** button.

Message Board

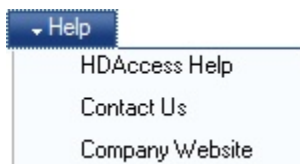
The Message Board allows system administrators to broadcast information of interest to all users at the same time. The headline of each message will scroll in the Message Board headline window at the top of the HDAccess window as shown below.



Clicking on the headline will open the Message Board window to display the text of the current headline and message.



The Help Menu

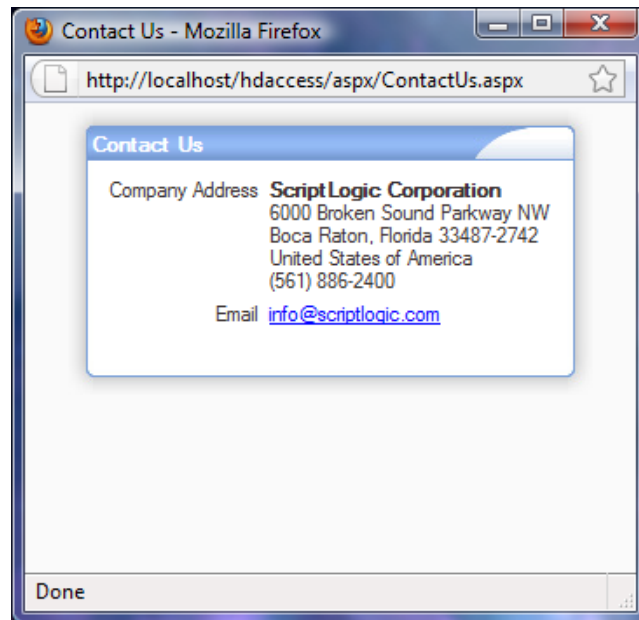


HDAccess Help

Selecting **HDAccess Help** from the Help menu will open the HDAccess User Manual in PDF format (the manual you are currently reading).

Contact Us

Selecting the **Contact Us** option from the Help menu will open the Contact Us window as shown below.



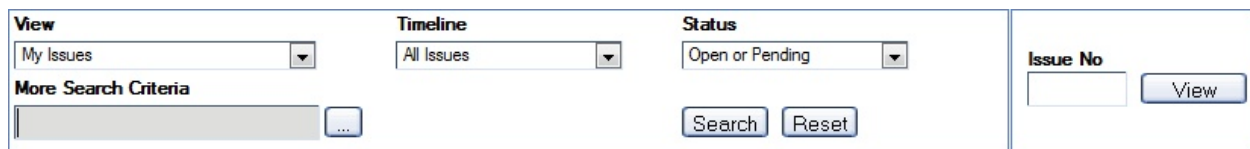
Company Website

Selecting the **Company Website** option will open the company's website in a new browser window.

Viewing Issues

After logging in as a requester, HDAccess will display the View Issues window. From this window, you can search for issues and view them in the issue list. You can also open issues in a View/Modify Issue window where you can edit them, as well as read/add activity notes and add attachments.

The Search Pane

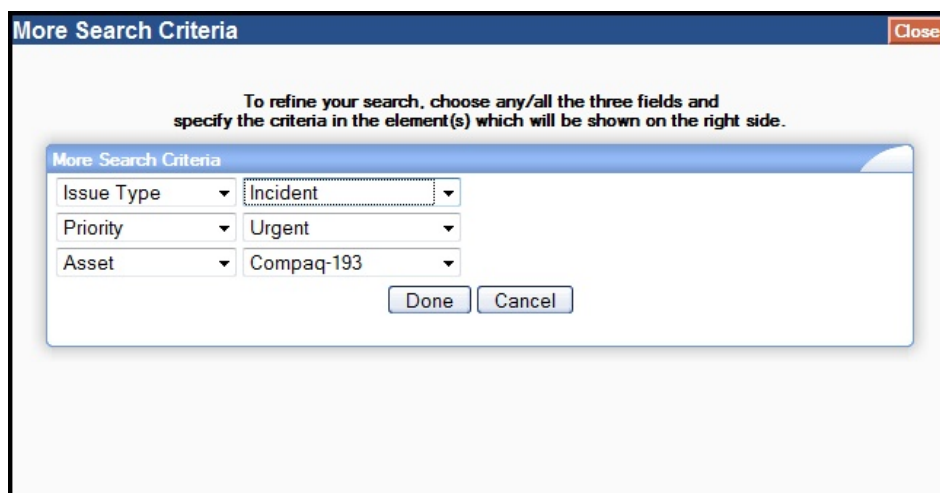


The Search Pane is a web-based interface for filtering issues. It features three dropdown menus: 'View' (set to 'My Issues'), 'Timeline' (set to 'All Issues'), and 'Status' (set to 'Open or Pending'). Below these is a 'More Search Criteria' section with a text input field and a search icon. To the right, there is an 'Issue No' input field and a 'View' button. At the bottom center are 'Search' and 'Reset' buttons.

The Search Pane allows you to search through your Issues to find the ones you are particularly interested in. By using the search field criteria, you are able to pinpoint just the issues you would like to review.

Each field is described in the following table.

Field	Description
View	From this drop-down menu you can select to view the issues you have submitted or all issues reported by your company, department and/or location, (depending on the options that the HDAccess administrator has selected).
Timeline	Select issues from the past 1, 7, 30, 60 or 90 days.
Status	Choose from All, Open, Closed, Pending or Suspended.
Issue No	Enter the Issue number you would like to view.
More Search Criteria	Opens the More Search Criteria window and allows you to further refine your search by specifying up to three additional fields upon which to search. (See screen shot below)



The 'More Search Criteria' dialog box is used to refine searches. It contains three dropdown menus: 'Issue Type' (set to 'Incident'), 'Priority' (set to 'Urgent'), and 'Asset' (set to 'Compaq-193'). Below these are 'Done' and 'Cancel' buttons. The dialog box has a title bar with a 'Close' button and a message: 'To refine your search, choose any/all the three fields and specify the criteria in the element(s) which will be shown on the right side.'

The Results Pane

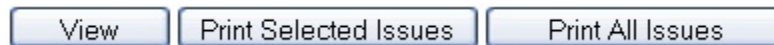
The Results Pane is a table containing all the issues that match the criteria you specified in the Search Pane. The columns of the table are defined by the layout designed by the administrator. The table is initially sorted by issue number but can be resorted according to the contents any column by clicking on the column name – once to sort ascending, twice to sort descending.

There are several ways to open any issue in a View/Modify Issue window:

- Double click anywhere in the table row the issue is in
- Click the **Issue No** link
- Click the check box in the issue's row and click the **View** button

When you have an issue open in the View/Modify window, you can edit the issue if necessary. See the next section of this manual for detailed instructions on editing issues.

If there is more than one page of results, use the forward and backward page buttons, or select the page you want to go to in the **Page of** drop-down menu.



To select an issue to print, check the checkbox next to the issue, then click the **Print Selected Issues** button. You can select more than one issue to print. Clicking the **Print All Issues** button will print all the issues.

Editing Issues

After opening an issue to view (as described in the previous section of this manual), you may have the need to make changes on some of the information in the issue. Your issue will be opened in a View/Modify window as shown below. This is where the changes can be made.

The screenshot shows a web application window titled "View/Modify Issues" with a "Close" button in the top right corner. The main content area displays the following information:

Needs help installing MS Excel
Issue Number 4

Issue Details

Summary	Needs help installing MS Excel			
Description	Needs help installing MS Excel			
Status	Open	Sub-Status	Assigned	
Priority	Medium	Due Date		
Issue Type	Request for Information	Category	Software	
Sub-Category 1	Office	Sub-Category 2	Excel	
Asset		Assigned Group	Help Desk	
Received On	3/13/2010 11:11:15 AM	Resolved Date		
Updated By	Helpdesk Administrator	Updated Date	1/31/2011 2:42:56 PM	
Resolution				

Requester Details

Requester	Adam Cox	Department		
Phone	913-258-4981	Location	Kansas City	

Notes

Activity Type	Date/Time	Time Spent	Entered By	Activity Billable	Activity Note	Cost

Activity Total Time:

Attachments

Select File:

1. To update any field, click the icon. This will open the field for editing.
2. Make the change you require and click the icon to save the change and close the field, or to cancel the change and close the field with the previous value intact.

Notes

Activity Type	Date/Time	Time Spent	Entered By	Activity Billable	Activity Note	Cost
Requester Note	3/21/2011 3:19:12 PM	000:00:00	Adam Cox	No	This is a sample not...	0
Requester Note	3/21/2011 3:19:31 PM	000:00:00	Adam Cox	No	Look at this. Anoth...	0
Requester Note	3/21/2011 3:25:45 PM	000:00:00	Adam Cox	No	Blah blah blah blah ...	0

Activity Total Time

3. In the Notes section, you can view existing notes on the issue, or you can add notes to the issue (with limitations). To view a note, highlight the note in the issue list and click the **View Note** button. This will open a View Note window. The fields cannot be edited in this window. Click the **Close** button when finished viewing the note.
4. To add a new note, click the **Add Note** button. This will open the Add Note window. The issue number will automatically be in the **Issue No** field. In the large text field, enter the text of your note. Click the **Save** button when the note is complete.
5. The Activity Total Time is updated from the notes automatically and cannot be edited.

Attachments

Select File

File Name
2.jpg

6. In the Attachments section, you can view attachments that have been added to the issue. To view an attachment, select it from the File Name list and click the **View** button. This will open a new window with the attachment (such as an image), or the application best for viewing the attachment, such as Word or Acrobat.
7. To add an attachment, click the **Browse** button and select the file you wish to attach from the File Upload window. Click the **Open** button to close the File Upload window. Click the **Attach File** button to attach the file to the issue. The attachment will now be included in the File Name list.
8. When you have completed editing the issue, click the **Save** button.